

Making Your Home Work for You in Retirement

How Your Home Fits in the Estate Planning Puzzle

May 20, 2020 | 2:00 p.m. - 3:00 p.m. EDT

Zoom Webinar

Event Sponsor: HomeHaven

Most people say they would like to stay in their homes as long as possible in retirement but few have planned to make it work. The challenges are physical and financial. Accessibility and safety become major priorities. As our incomes decrease in retirement, many find themselves house rich and cash poor. Many wonder if they have to move away to live well.

In this presentation hosted by HomeHaven, David Bussolotta, a Pullman & Comley Trust and Estates' attorney, will be joined by Mortgage Specialist David Swanson and Home Transformation Designer Colin Healy. Together, they will explain how your home is a key element in your retirement planning process.

Topics that will be covered include:

- How your home value contributes to your net worth
- How does my home fit in a Business Succession Plan?
- Should I put my home in a trust?
- Is a reverse mortgage right for me?
- What I need to know about Title XIX
- How to unlock that value at the right time
- The value of designing a master plan for your home for your later years
- The ins and outs of Accessory Dwelling Units/ In-law Apartments
- How to pay for needed repairs or accessibility modifications

To join the webinar, [click here](#).

Professionals

David B. Bussolotta

pullcom.com  [@pullmancomley](https://twitter.com/pullmancomley)

BRIDGEPORT
203.330.2000

HARTFORD
860.424.4300

SPRINGFIELD
413.314.6160

WAKEFIELD
401-360-1533

WATERBURY
203.573.9700

WESTPORT
203.254.5000

WHITE PLAINS
914.705.5355

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Practice Areas

Trusts and Estates